



Outpatient Caseload Assignment Forms

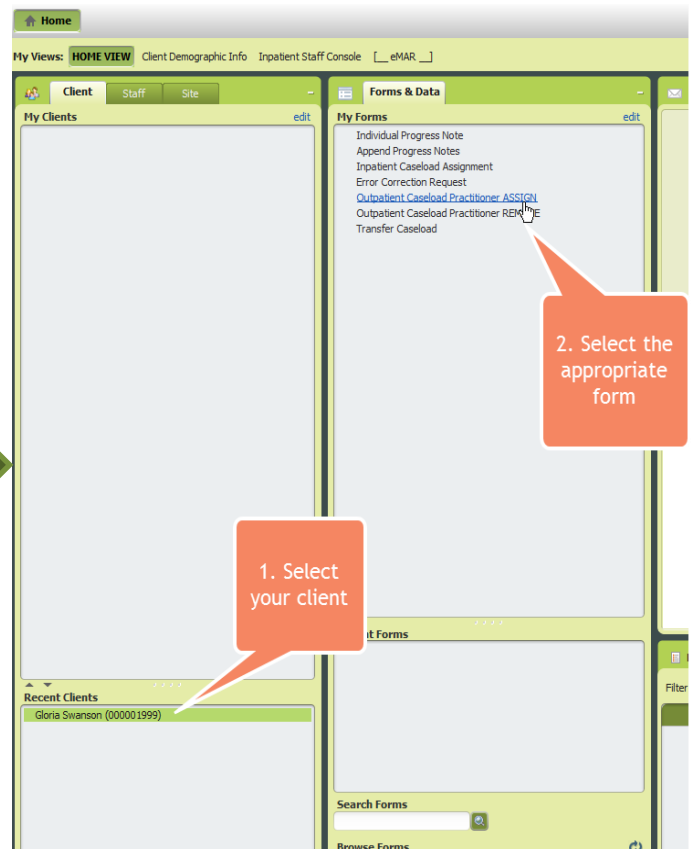
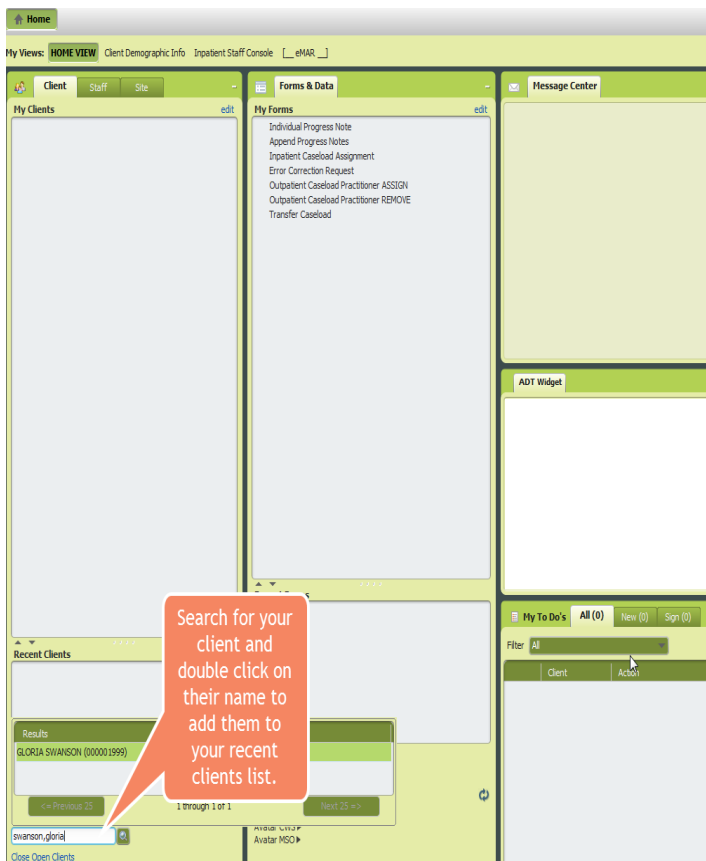
Outpatient caseload assignment can be managed using these three forms:

- Outpatient Caseload Practitioner ASSIGN- Use this form to assign a Practitioner to a client's Care Team.
- Outpatient Caseload Practitioner REMOVE- Use this form to remove a Practitioner from the Care Team.
- Transfer Caseload- Use this form if you need to transfer all or selected clients to another Practitioner.



Outpatient Caseload Practitioner ASSIGN- to assign a Practitioner to a client's Care Team

From your HOME VIEW:



GLORIA SWANSON (000001999)
F, 118, 03/27/1899
Ht: 5' 2", Wt: 145 lbs, BMI: 26.5

Outpatient Caseload Practitioner ASSIGN

Name: GLORIA SWANSON
ID: 1999
Sex: Female
Date of Birth: 03/27/1899

Episode	Program	Start
4	La Causa-AODA-TCM	02/10/2018

1. Select the appropriate episode

2. Click ok

OK Cancel

Outpatient Caseload Practitioner ASSIGN form opens.

1. Enter the date of caseload action
2. Search/enter the Practitioner to Assign
3. Select the appropriate Practitioner Role
4. For CCS only, enter the appropriate Agency name.
5. Click Submit

GLORIA SWANSON (000001999)
F, 118, 03/27/1899
Ht: 5' 2", Wt: 145 lbs, BMI: 26.5

Ep: 4 : La Causa-AODA-TCM
Problem P: -
DX P:

Location: 904 Crescent Drive, Beverly Hills, CA
Attn. Pract.: No Entry
Adm. Pract.: No Entry

Outpatient Caseload Practitioner ASSIGN

Assign Practitioner

5 Submit

1 Date of Caseload Action
02/27/2018 T Y

2 Practitioner to Assign
Nathan Berman (NathanBerman)

4 CCS ONLY - Please Enter Agency Name
Agency Name

3 Practitioner Role
☒ Case Manager/Care Coordinator
☐ Clinical Coordinator/Supervisor
☐ Employment Specialist
☐ Housing Specialist
☐ Intake Coordinator
☐ Intern/Student
☐ Mental Health Professional
☐ Mental Health Tech/Rehab Specialist
☐ Peer Support Specialist
☐ Psychiatric Prescriber
☐ Psychologist
☐ Registered Nurse
☐ Substance Abuse Professional
☐ Therapist/Counselor
☐ Other
 Specify Other Practitioner Role

After submitting the form, address the pop-up.

The screenshot shows the 'Assign Practitioner' form in a web application. At the top, there is a header bar with user information: GLORIA SWANSON (000001999), F, 118, 03/27/1899, Ht: 5' 2", Wt: 145 lbs, BMI: 26.5. Below this, there is a section for 'Outpatient Caseload Practitioner ASSIGN'. The form includes a 'Date of Caseload Action' field set to 02/27/2018, a 'Practitioner to Assign' dropdown menu showing 'Nathan Berman (NathanBerman)', and a 'Specify Other Practitioner Role' section with a list of roles. A 'Form Re-enter' pop-up window is displayed in the foreground, asking 'Submitting has completed. Do you wish to re-enter the form?' with 'Yes' and 'No' buttons. An orange callout box points to the 'Yes' button with the text: 'Click YES if you need to select another client and add any new Practitioner. Click NO if you are finished.'


Selecting YES allows you to ASSIGN a different Practitioner to a client.

The screenshot shows the 'Select Client' pop-up window, which has a search bar and a list of clients. An orange callout box points to the search bar with the text: 'Search for a new client and click Select'. Below the pop-up, the 'Outpatient Caseload Practitioner ASSIGN' summary table is visible. The table has four columns: 'Date of Caseload Action', 'Practitioner to Assign', 'Practitioner Role', and 'Data Entry By (Login)'. The table contains 15 rows of data, showing various practitioners and their roles assigned to clients. An orange callout box points to the 'Add' button at the bottom left of the table with the text: 'Click add'.

Date of Caseload Action	Practitioner to Assign	Practitioner Role	Data Entry By (Login)
02/15/2018	Daniel Norton Test Account	Clinical Coordinator/Supervisor	Larry Eaton (NTST) test user
02/15/2018	Larry Eaton SYSADM (NTST)	Case Manager/Care Coordinator	Larry Eaton SYSADM (NTST)
02/15/2018	Nathan Berman	Case Manager/Care Coordinator	Susanne Morris (TEST)
02/14/2018	BrandyReding JMSD BA	Case Manager/Care Coordinator	Larry Eaton SYSADM (NTST)
02/14/2018	Cody Mallory	Other	Cody Mallory
02/12/2018	Duane Lahti	Case Manager/Care Coordinator	Larry Eaton (NTST) test user
02/12/2018	Larry Eaton (NTST) test user	Case Manager/Care Coordinator/Other	Larry Eaton SYSADM (NTST)
02/10/2018	Larry Eaton SYSADM (NTST)	Case Manager/Care Coordinator	Larry Eaton SYSADM (NTST)
02/10/2018	Larry Eaton SYSADM (NTST)	Case Manager/Care Coordinator	Larry Eaton SYSADM (NTST)
02/10/2018	Larry Eaton (NTST) test user	Case Manager/Care Coordinator	Larry Eaton SYSADM (NTST)
02/10/2018	Larry Eaton SYSADM (NTST)	Case Manager/Care Coordinator	Larry Eaton SYSADM (NTST)

Now you get a Pre-Display (summary view) showing all previous caseload actions.

Repeat process to ASSIGN another Practitioner to a client.



HARRY POTTER (008163277)
M

Epi: 5 : CARS

Problem P: -

DX P:

Location: , ,

Attn. Pract.: No Entry

Adm. Pract.: No Entry

Chart

Outpatient Caseload Practitioner ASSIGN

Assign Practitioner

Submit

Assign Practitioner

Date of Caseload Action

02/27/2018

T

Y

Practitioner to Assign

Susanne Morris (SMorris)

CCS ONLY - Please Enter Agency Name

Agency Name

Practitioner Role

☒ Case Manager/Care Coordinator

☐ Clinical Coordinator/Supervisor

☐ Employment Specialist

☐ Housing Specialist

☐ Intake Coordinator

☐ Intern/Student

☐ Mental Health Professional

☐ Mental Health Tech/Rehab Specialist

☐ Peer Support Specialist

☐ Psychiatric Prescriber

☐ Psychologist

☐ Registered Nurse

☐ Substance Abuse Professional

☐ Therapist/Counselor

☐ Other

Specify Other Practitioner Role

Chart

Outpatient Caseload Practitioner ASSIGN

Assign Practitioner

Submit

Assign Practitioner

Date of Caseload Action

02/27/2018

T

Y

Practitioner to Assign

Susanne Morris (SMorris)

CCS ONLY - Please Enter Agency Name

Agency Name

Practitioner Role

☒ Case Manager/Care Coordinator

☐ Clinical Coordinator/Supervisor

☐ Employment Specialist

☐ Housing Specialist

☐ Intake Coordinator

☐ Intern/Student

☐ Mental Health Professional

☐ Mental Health Tech/Rehab Specialist

☐ Peer Support Specialist

☐ Psychiatric Prescriber

☐ Psychologist

☐ Registered Nurse

☐ Substance Abuse Professional

☐ Therapist/Counselor

☐ Other

Specify Other Practitioner Role

Form Re-enter

Submitting has completed. Do you wish to re-enter the form?

Yes

No

After Submitting form, click NO if you are finished.

Return to Home View to finish.

My Views: HOME VIEW Client Demographic Info [*** ORDER ENTRY ***] [eMAR]

Selected Client:

Client

Staff

Site

My Clients

Gloria Swanson (000001999)

Harry Potter (008163277)

Recent Clients

Harry Potter (008163277)

Search Clients

advanced

Close Open Clients

Forms & Data

My Forms

Individual Progress Note

Append Progress Notes

Inpatient Caseload Assignment

Error Correction Request

Outpatient Caseload Practitioner ASSIGN

Outpatient Caseload Practitioner REMOVE

Transfer Caseload

Recent Forms

Outpatient Caseload Practitioner ASSIGN

Search Forms

Browse Forms

Avatar PM

Avatar CWS

Avatar NSO

Order Notification Widget

Message Center

Effective Date: 02/19/2018

*** AVATAR HELPDESK Support - Phone: 1-855-400-0797 ***

My To Do's

All (1)

New (0)

Sign (0)

Filter

All

Client	Action	Form	Sent	Comments	Note-to-Self
Gloria Swanson	Review To Do Item	Crisis Progress Note	02/26/2018	Review Draft ...	

Last Modified 2/27/18

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Outpatient Caseload Practitioner REMOVE- to remove a Practitioner from a client's Care Team (Note- when an Episode is closed, the Practitioner is automatically removed from the Care Team)

From your Home View, select the Outpatient Caseload Practitioner REMOVE form.

Home

My Views: HOME VIEW Client Demographic Info Inpatient Staff Console [eMAR]

Client Staff Site

My Clients

Gloria Swanson (000001999)

Recent Clients

Search Clients advanced

Close Open Clients

Forms & Data

My Forms

Individual Progress Note
Append Progress Notes
Inpatient Caseload Assignment
Error Correction Request
Outpatient Caseload Practitioner ASSIGN
Outpatient Caseload Practitioner REMOVE
Transfer Caseload

Recent Forms

Search Forms

Browse Forms

Avatar PM
Avatar CWS
Avatar MSO

1. Select the Date of Caseload Action
2. Select the Practitioner to Remove
3. Click Submit

Home Gloria S

GLORIA SWANSON (000001999)

F, 118, 03/27/1899

Ht: 5' 2", Wt: 145 lbs, BMI: 26.5

Ep: 4 : La Causa-AODA-TCM

Problem P: -

DX P:

Location: 904 Crescent Drive, Beverly Hills, CA

Attn. Pract.: No Entry

Adm. Pract.: No Entry

Chart Outpatient Caseload Practitioner REMOVE

Remove Practitioner

Submit

Remove Practitioner

Date of Caseload Action 1

02/16/2018

Practitioner to Remove 2

Susanne Morris (TEST) (SMorris.Test)



Transfer Caseload- to transfer one or more clients from one Practitioner's caseload to another

From your Home View, select the Transfer Caseload form

The screenshot shows the 'Home View' interface. On the left, there are sections for 'My Clients' and 'Recent Clients'. On the right, the 'Forms & Data' section is active, displaying a list of forms. 'Transfer Caseload' is highlighted with a mouse cursor. Below the list, there are sections for 'Recent Forms' and 'Search Forms'.

The screenshot shows the 'Transfer Caseload' form. It includes fields for 'Caseload Assignment Type', 'Transfer Caseload From', 'Transfer Caseload To', and 'Reason for Transfer'. There are also radio buttons for 'All or Selected Caseload Entries' and 'Step Through Each Entry Upon Filing'. A modal window titled 'myAvatar 2017 - Select Caseload Entries' is open, showing a table of clients with checkboxes for selection. Numbered callouts 1 through 9 point to specific elements: 1 points to the 'Caseload Assignment Type' dropdown, 2 points to the 'Transfer Caseload From' field, 3 points to the 'Transfer Caseload To' field, 4 points to the 'Reason for Transfer' field, 5 points to the 'All or Selected Caseload Entries' radio buttons, 6 points to the 'Select Caseload Entries' button, 7 points to the client table in the modal, 8 points to the 'OK' button in the modal, and 9 points to the 'Submit' button on the form.

1. Caseload Assignment Type is: **Outpatient Caseload Practitioner ASSIGN: Practitioner to Assign** *Use caution to select the correct assignment type*
2. Select the Practitioner to transfer the caseload from
3. Select the Practitioner to transfer the caseload to
4. Provide a reason for transfer
5. Select **All** to transfer entire caseload or **Selected** to transfer individual clients
6. If applicable, click Select Caseload Entries
7. Select clients to transfer
8. Click OK
9. Click Submit

This close-up shows the 'All or Selected Caseload Entries' section with the 'Selected' radio button selected. Below it, the 'Step Through Each Entry Upon Filing' section has the 'No' radio button selected.

***If All is selected, choose No for Step Through Each Entry.**